



USDA Weekly Retail Turkey Feature Activity

Fri. Nov 24, 2006

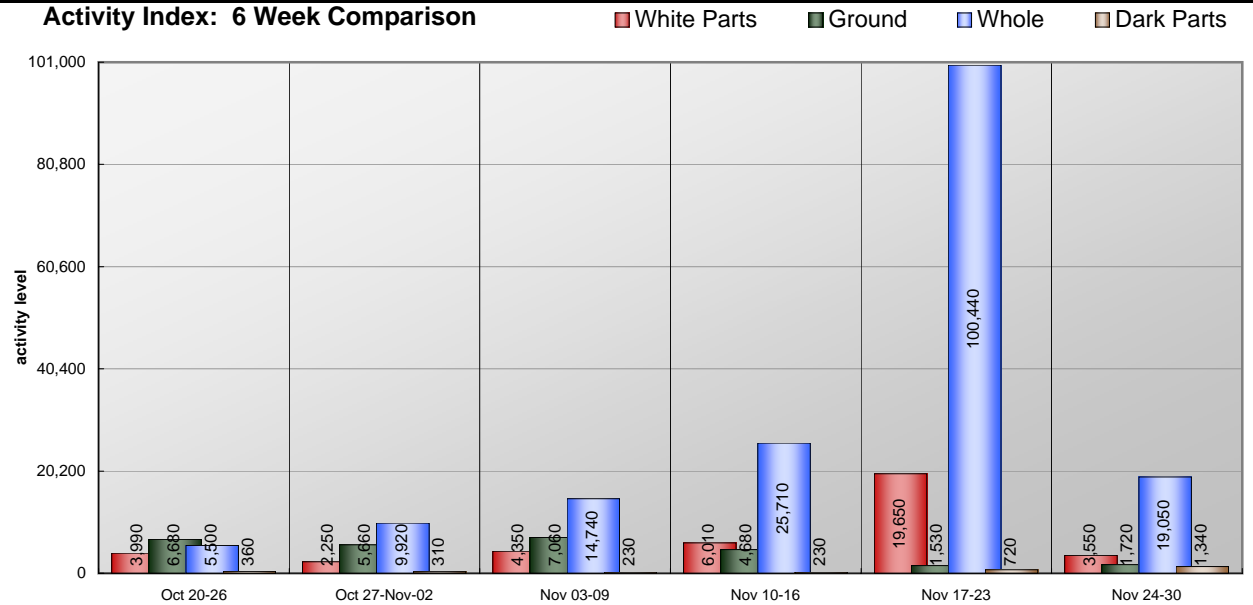
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 11/24 thru 11/30.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

| NATIONAL SUMMARY | | | | | | |
|------------------------|-------------------------|---------|-------------------------|---------|-------------------------|---------|
| | THIS WEEK | | LAST WEEK | | LAST YEAR | |
| Feature Rate 1/ | 29.4% of 17,000 outlets | | 99.6% of 17,000 outlets | | 40.8% of 16,700 outlets | |
| Special Rate 4/ | 4.4% | | 13.4% | | 8.3% | |
| Activity Index 2/ | 25,750 | | 122,650 | | 47,640 | |
| 3/ | Stores | Wtd Avg | Stores | Wtd Avg | Stores | Wtd Avg |
| WHOLE BIRDS: | | | | | | |
| Fresh - Hens | 4,020 | 1.21 | 21,950 | 1.22 | 9,130 | 1.19 |
| " - Toms | 4,020 | 1.21 | 22,040 | 1.22 | 8,490 | 1.17 |
| Frozen - Hens | 5,700 | 0.82 | 27,920 | 0.78 | 10,400 | 0.72 |
| " - Toms | 5,310 | 0.82 | 28,530 | 0.76 | 10,070 | 0.71 |
| PARTS: | | | | | | |
| Breast: | | | | | | |
| Bone-in, whole | | | | | | |
| Fresh | 1,080 | 2.25 | 5,840 | 2.05 | 2,110 | 2.18 |
| Frozen | 2,000 | 1.65 | 9,670 | 1.65 | 3,020 | 1.33 |
| Hotel Style | | | | | | |
| Fresh | 70 | 1.99 | 10 | 1.79 | | |
| Frozen | | | | | | |
| Split, bone-in | | | | | | |
| Fresh | | | | | | |
| Rotisserie | 250 | 7.66 | 3,460 | 7.88 | 720 | 7.75 |
| Boneless, whole | 20 | 3.99 | 240 | 3.27 | | |
| Cutlets | 80 | 4.12 | 260 | 4.20 | | |
| Cutlets, thin sliced | | | 70 | 3.99 | | |
| Strips | | | | | | |
| Tenders | 50 | 3.99 | 100 | 3.91 | 120 | 3.99 |
| Marinated Tenders | 90 | 4.28 | 310 | 3.99 | | |
| Drumsticks | | | | | | |
| Thighs | 100 | 1.37 | 100 | 1.13 | 140 | 1.02 |
| Wings | 100 | 1.49 | 50 | 1.28 | | |
| Necks | 20 | 0.89 | 50 | 1.03 | 120 | 0.99 |
| Necks | | | 50 | 0.91 | | |
| Smoked Drumsticks | 600 | 1.66 | 390 | 1.86 | 490 | 1.49 |
| Smoked Wings | 500 | 1.69 | 40 | 1.39 | 510 | 1.49 |
| Smoked Necks | | | 40 | 1.39 | | |
| GROUND TURKEY: | | | | | | |
| Patties | 1,720 | 2.31 | 1,530 | 2.53 | 2,320 | 2.34 |
| Sausage | 210 | 2.99 | 30 | 2.46 | 300 | 2.34 |
| 85% lean | 690 | 2.32 | 760 | 2.30 | 810 | 2.39 |
| 93% lean | 20 | 1.59 | 70 | 2.23 | | |
| Breast | 750 | 2.03 | 290 | 2.08 | 1,110 | 2.15 |
| Breast | 50 | 3.99 | 380 | 3.38 | 100 | 3.99 |
| Rolls (frsh/frz 1 lb.) | | | | | -- | -- |

Note: rolls not included in ground fresh ground turkey total and weighted average.

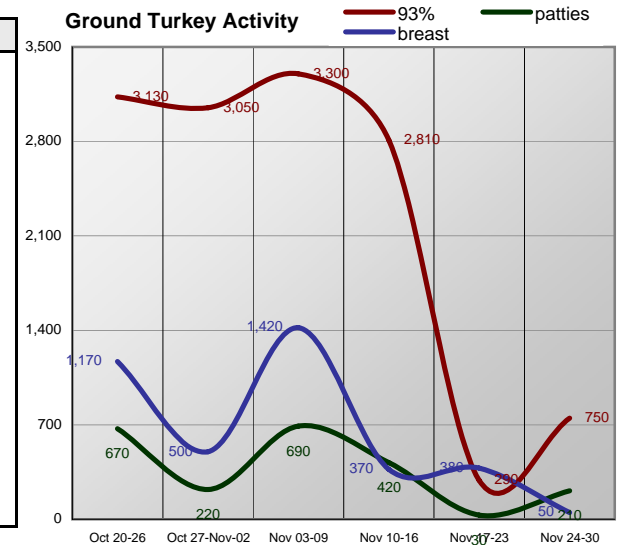
Activity Index: 6 Week Comparison



Turkey Featuring - 11/24 thru 11/30

As the Thanksgiving shopping period passes, turkey promotions at retail outlets have dropped off sharply. Whole bird features remain in effect through the post-holiday weekend at many locations but turkey is largely absent from most new ads. Whole bird and breast cuts remain the most prominently promoted items at mostly steady average price levels. Dark cuts are seeing limited promotions with smoked products being most active. Ground turkey featuring remains limited but is beginning to increase late in the ad cycle. Turkey can be expected to have a low profile during the first two weeks of December as retailers move competing meats to the forefront.

Ground Turkey Activity



All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/: **FEATURE RATE**: the amount of sampled stores advertising any reported turkey item during the current week, expressed as a percentage of the total sample. 2/: **ACTIVITY INDEX**: a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). 3/: **STORES/AVG**: the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. 4/: **SPECIAL RATE**: the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.)



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| | EASTERN U.S. (CT,DC,DE,FL,GA,MA,MD,ME,NC,NH,NJ, NY,PA,RI,SC,VA,VT,WV) | | | CENTRAL U.S. (AL,AR,IA,IL,IN,KS,KY,LA,MI,MN,MO,MS,ND, NE, OH, OK,SD,TN,TX,WI) | | | WESTERN U.S. (AZ,CA,CO,ID,MT,NM,NV,OR,UT,WA,WY) | | |
|---|--|---------------------------|------|---|---------------------------|------|--|---------------------------|------|
| Feature Rate 1/ Special Rate 4/ Activity Index 2/ | 39.8% of 7,900 sampled outlets 5.2% of stores w/ no-price promotions Activity Index = 15,480 | | | 30.1% of 5,200 sampled outlets 6.5% of stores w/ no-price promotions Activity Index = 8,880 | | | 7.2% of 3,900 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 1,390 | | |
| | Price Range (\$/pound) | Summary Stores Wtd Avg | | Price Range (\$/pound) | Summary Stores Wtd Avg | | Price Range (\$/pound) | Summary Stores Wtd Avg | |
| WHOLE BIRDS: | | | | | | | | | |
| Fresh - Hens | 0.68 - 1.49 | 2,230 | 1.14 | 0.99 - 1.69 | 1,380 | 1.21 | 0.96 - 1.69 | 410 | 1.58 |
| " - Toms | 0.68 - 1.49 | 2,230 | 1.14 | 0.99 - 1.69 | 1,380 | 1.21 | 0.96 - 1.69 | 410 | 1.58 |
| Frozen - Hens | 0.25 - 1.39 | 3,200 | 0.86 | 0.38 - 1.39 | 2,300 | 0.75 | 0.43 - 1.29 | 200 | 0.98 |
| " - Toms | 0.25 - 1.39 | 2,850 | 0.86 | 0.38 - 1.39 | 2,260 | 0.75 | 0.43 - 1.29 | 200 | 0.98 |
| PARTS: | | | | | | | | | |
| Breast: | | | | | | | | | |
| Bone-in, whole | | | | | | | | | |
| Fresh | 1.79 - 2.79 | 530 | 2.14 | 1.99 - 2.49 | 430 | 2.24 | 2.79 | 120 | 2.79 |
| Frozen | 1.29 - 2.79 | 1,100 | 1.74 | 1.29 - 1.79 | 850 | 1.51 | 1.98 | 50 | 1.98 |
| Hotel Style | | | | | | | | | |
| Fresh | 1.99 | 70 | 1.99 | | | | | | |
| Frozen | | | | | | | | | |
| Split, bone-in | | | | | | | | | |
| Fresh | | | | | | | | | |
| Rotisserie | 5.99 - 8.99 | 220 | 7.71 | 6.99 - 7.99 | 30 | 7.27 | | | |
| Boneless, whole | 3.99 | 20 | 3.99 | | | | | | |
| Cutlets | 3.99 - 4.29 | 80 | 4.12 | | | | | | |
| Cutlets, thin sliced | | | | | | | | | |
| Strips | | | | | | | | | |
| Tenders | 3.99 | 50 | 3.99 | | | | | | |
| Marinated Tenders | 4.26 - 4.32 | 90 | 4.28 | | | | | | |
| Drumsticks | 0.89 - 1.49 | 100 | 1.35 | 1.49 | 20 | 1.49 | | | |
| Thighs | 1.49 | 80 | 1.49 | 1.49 | 20 | 1.49 | | | |
| Wings | 0.89 | 20 | 0.89 | | | | | | |
| Necks | | | | | | | | | |
| Smoked Drumsticks | 1.49 - 1.69 | 550 | 1.65 | 1.69 | 50 | 1.69 | | | |
| Smoked Wings | 1.69 | 450 | 1.69 | 1.69 | 50 | 1.69 | | | |
| Smoked Necks | | | | | | | | | |
| GROUND TURKEY: | | | | | | | | | |
| Patties | 2.99 | 210 | 2.99 | | | | | | |
| Sausage | 1.99 - 2.39 | 610 | 2.32 | 2.08 - 2.39 | 80 | 2.28 | | | |
| 85% lean | 1.59 | 20 | 1.59 | | | | | | |
| 93% lean | 1.87 - 2.59 | 720 | 2.03 | 2.00 | 30 | 2.00 | | | |
| Breast (99-100% lean) | 3.99 | 50 | 3.99 | | | | | | |
| Rolls (frsh/frz 1 lb.) | | | | | | | | | |